

flexmls™ PC

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System Requirements

flexmls PC software suggested minimums:

- 32-bit processor (such as a Pentium III or better) running Windows 9x, ME, 2000, XP, Vista.
- 256 MB of RAM or more.
- 16-bit (true) color or higher.
- 800 x 600 resolution.
- At least 500 MB of hard disk space (about 40 MB for the program files, and 400+ MB for the data and photo files – more depending on the amount of listing history and the number of photos downloaded).
- CD-ROM drive.
- Internet access.

Note:

If you use AOL, you can use the download functionality of flexmls PC, but flexmls PC's e-mail functions only work with standard e-mail (Simple MAPI is the technical term) programs (such as Microsoft Outlook or Netscape Communicator) as opposed to AOL's closed, proprietary e-mail program.)

Welcome and Support

Welcome to **flexmls™ PC** Distributed PC MLS Software from FBS Data Systems

Congratulations on your purchase of the flexmls PC software suite. This software is designed to provide you with distributed access to your MLS data and photos. If you have any comments or suggestions, please be sure to let us know.

Toll-Free Technical Support

support@flexmls.com

888-525-4747

Monday-Friday 8:00am-9:00pm Central Time

FBS takes great pride in providing personal Technical Support to the MLS staff and member agents. With FBS, staff and agents can call our toll-free Technical Support number directly. There is no need to go through the MLS office staff with your technical problem. We have learned over our 25 years of MLS experience that a message passed through too many hands can become misunderstood and end up taking far longer to resolve than necessary.

Our Technical Support Specialists are customer advocates who feel their job is to act on behalf of the customer to get their problem solved - **promptly**. Technical Support is available from 8:00am to 9:00pm CST Monday through Friday.

Installation Instructions

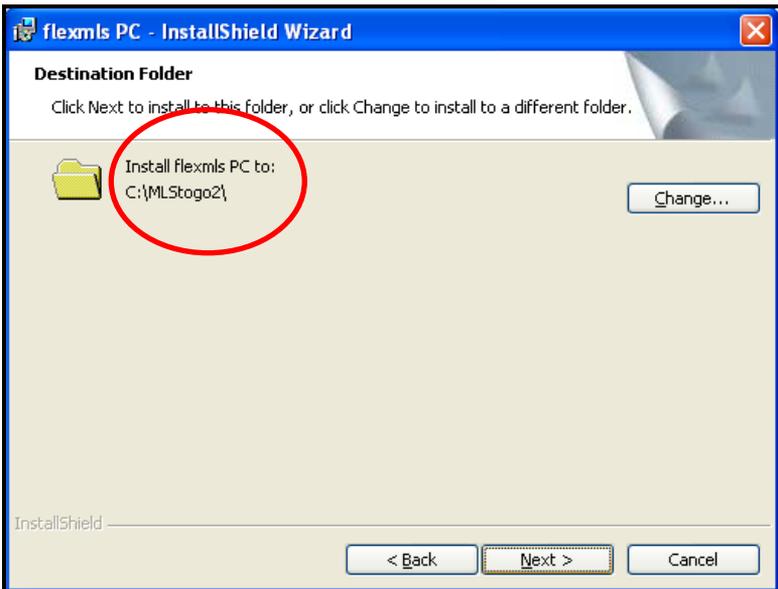
Installing flexmls PC software



You will receive one CD that contains the flexmls PC program and your M LS data. The data on the disk is current to the moment the disk was created.

Begin by inserting the CD into your CD drive. It should automatically start the installation program. If it does not, use Windows Explorer to view the contents of the CD (click on Start/Programs/Windows Explorer). To start the installation program, double-click your mouse on the file **Setup.exe** on the CD.

The installation program will guide you through the process. **IMPORTANT NOTE:** When you are asked where to install the software, you must accept the default directory or install on a different drive. If you choose a different drive, DO NOT change the default directory name, only change the drive letter (C:).



A pop-up window will appear alerting you to the process for downloading photos. The photos will install from a self-extracting zip file. Click **OK** to proceed.



Click **Unzip** to load all photos, then click **Close** to complete the installation process. After the installation program is complete, you may have to restart your computer.



Once the program is installed, you will have a **flexmls PC** icon on your Programs menu in Windows. To start the program, enter the



Programs menu from the Windows Start command, and select the **flexmls PC** option.

When you open flexmls PC, you will automatically be logged in. If you would like to force a login screen (for example, if you are installing flexmls PC on a computer which is shared by other users in the office), click on **Tools**, and choose **User Administration** on the menu bar of flexmls PC. (The password for the "master" login is "default." Only the master login may perform upload/downloads.)

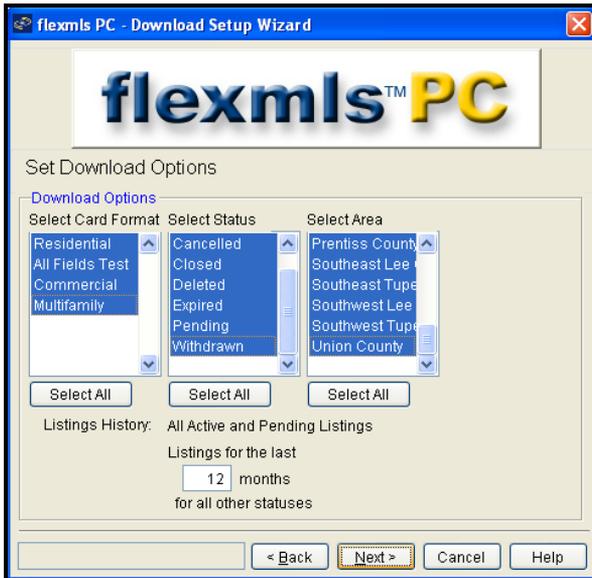
You are now ready to proceed to your first use of flexmls PC.

First Use of flexmls PC

Your copy of flexmls PC comes with listing data and photos already loaded. Before you can access that data, however, you must first register your software with flexmls by doing an initial download. You will be asked to perform a download; click on **Yes**. The Download Setup Wizard will walk you through the initialization process step by step.

Wizard Step 1: Enter your flexmls username and password. This is the username and password you use to enter the web-based flexmls system. After you have entered your username and password, click **Next**.

Wizard Step 2: On this page you will be able to select what property types, statuses, areas, and listing history you want to download. For all, simply click **Select All** for each. Note: Your CD came with all property types, statuses and areas downloaded, including 12 months of sold, expired, cancelled and withdrawn listings (all active and pending listings). When you have specified your download criteria, click **Next**.



Wizard Step 3: Select whether you want photos to download and whether you prefer one photo per listing or all available photos. Click **Next** to continue.

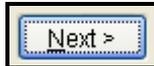
Set Photo Options

Photo Options

Download Photos

Photos for All Statuses
 Only Active Listings

For Each Listing Include All Photos
 One per listing



Wizard Step 4: Select whether you want flexmls PC to download automatically at specified times. Note: For this option to work, your computer must be on, connected to an open phone line or to the Internet, and flexmls PC must be open. To specify the time you want to download, use 24-hour notation (for example, 1400 is 2:00pm). To specify multiple times, enter the times separated by commas. Click **Finish** to save your timed download settings.

Set Timed download options

Timed download options

Retries

Number Of Retries

Timed Download

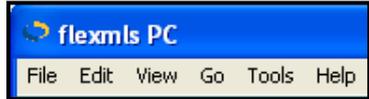
When
(eg. 14:00,22:30)

Introduction to flexmls PC

The flexmls PC program is designed with a multiple-access user interface so you may enter its functions several different ways.

The Standard Windows Menu

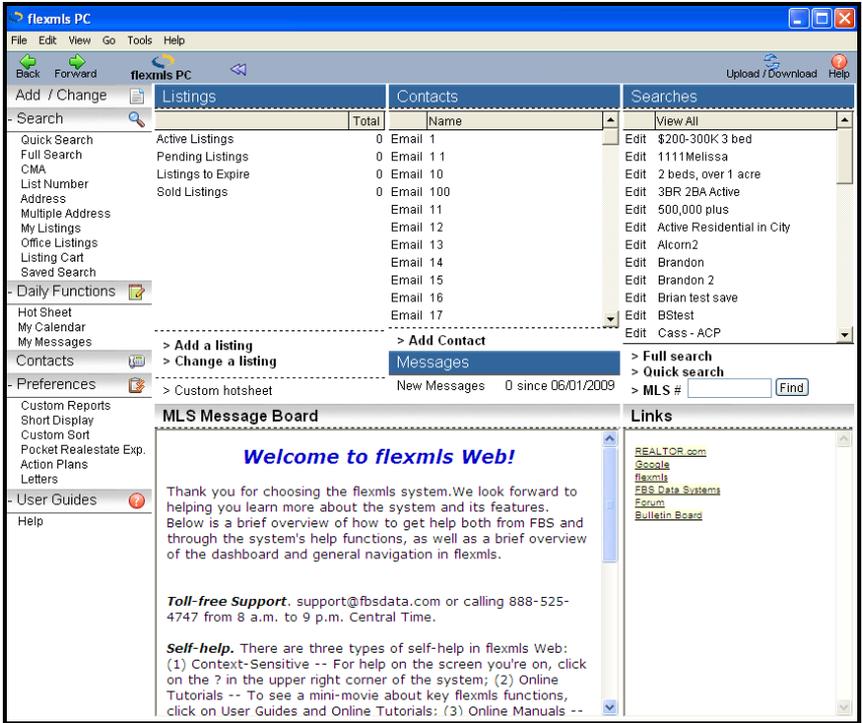
System: At the top of the flexmls PC window, you will find several menu functions (File, Edit, View, Go, Tools, and Help). You can navigate to most of the main modules in flexmls PC from the Go menu and access different options through the other menus.



The Tree-View Menu: flexmls PC includes a tree-view menu for you to navigate through the program. To see options under a particular tree node, click on the "+" sign next to the node name. The "+" will change to a "-" to indicate that the section is expanded. Click on the "-" sign to collapse the tree at that node. When you click your mouse on a node, it will display that information in the right pane of the flexmls PC window. The tree-view menu can be collapsed by clicking the double arrow icon next to the flexmls PC logo. The options then display as icons across the top of the screen. You may choose the size of these buttons and whether to include labels under the icons under **Tools, Options.**



The Dashboard: When you first open flexmls PC you will see the Dashboard. From here, you can click on any header (Listings, Contacts, and Searches) to access some of the major modules in the program. Click on any entry to access that particular item. The MLS Message Board and Links are available at the bottom. From any screen, click on the flexmls PC logo to return to the dashboard.



Back and Forward Buttons: Like a web browser, flexmls PC has **Back** and **Forward** buttons to help you navigate the system.

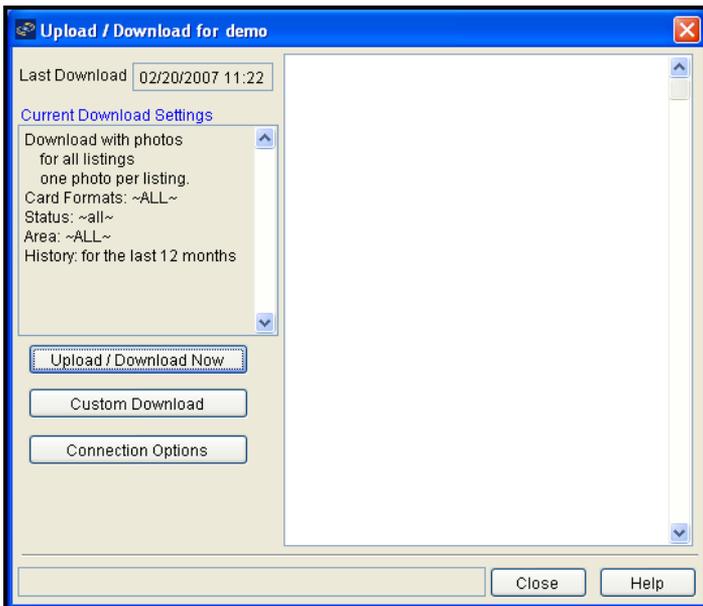


Downloads

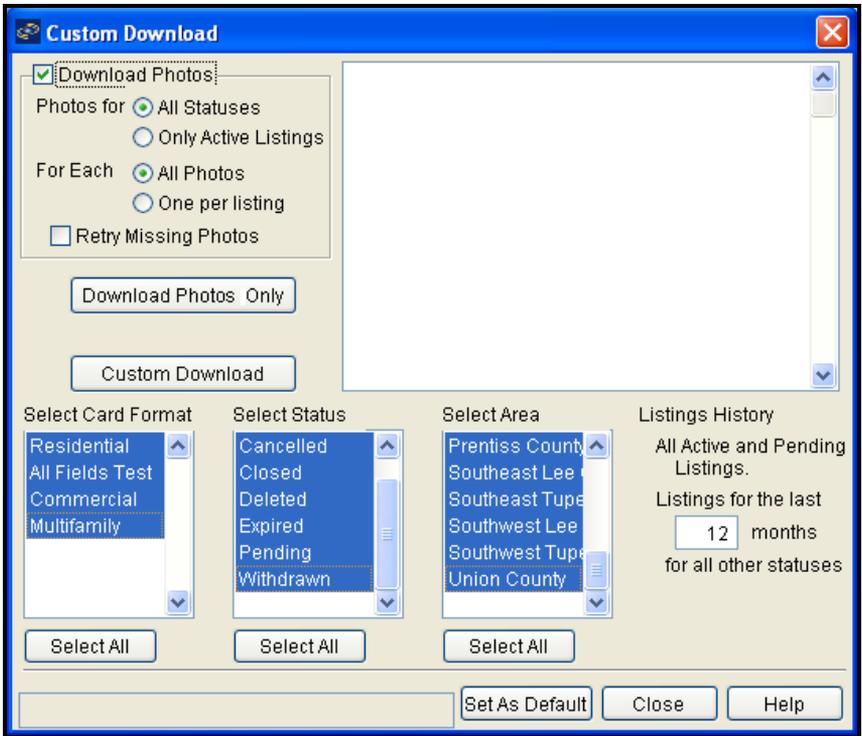
To perform or set up downloads, click on the **Tools** menu and select the **Upload/Download** option. From the Download screen, you can:

- Perform a manual download by clicking on **Upload/Download Now**.
- Change your download settings by clicking on **Custom Download**.
- Change how flexmls PC should expect your computer to connect to the Internet for the download by clicking on **Connection Options**.

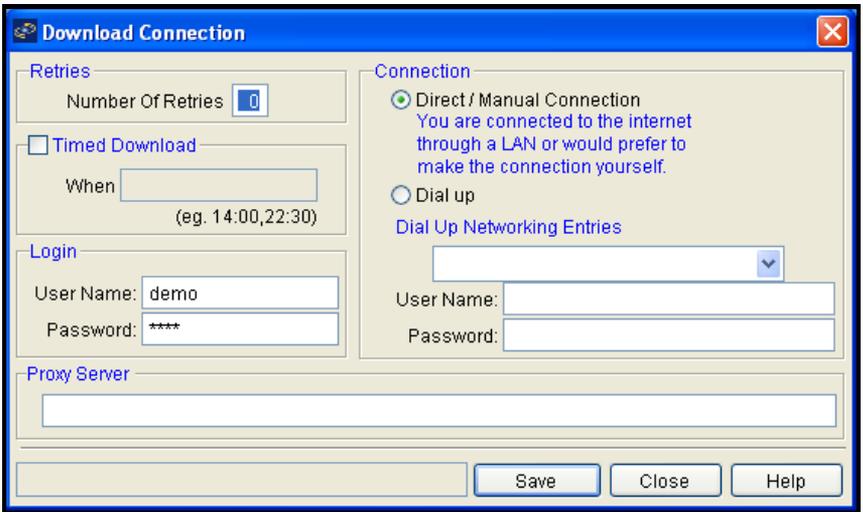
Changing How Your Computer Connects to the Internet for Downloads: For flexmls PC to download from flexmls Web, your computer needs to be connected to the Internet. The Connection Options screen allows you to specify how your computer is connected to the Internet, as well as whether you would like to perform timed, unattended downloads.



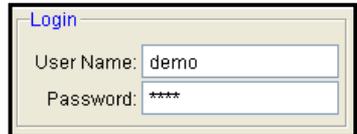
Custom Download: You can limit your download to: specific areas; specific property types; specific listing statuses; specific time periods for non-active listings; or how many photos you want for listings. **Note: We recommend only limiting by Property Types or Areas.** To select multiple areas, property types, or statuses, hold down the control key and click on each area, property type or status you wish to download. Once you have specified the download criteria you want, you can either click on **Custom Download** to start the download or click on **Set as Default** to set your custom download criteria as the default criteria. You can also just download new photos by clicking on the **Download Photos Only** button.



Connection Options: The Connections Options screen allows you to specify whether flexmls PC needs to establish a connection by using dial-up networking (the **Dial-up** option), your computer is always connected to the Internet through some type of dedicated Internet connection (typically an in-house corporate network or a DSL or cable line), or you will establish the connection yourself manually before running the download command (**Direct/Manual** option). If you select the **Dial-up** option you must also select the Dial-up networking entry you want flexmls PC to use. For more information on Dial-up Networking, please see Windows Help.



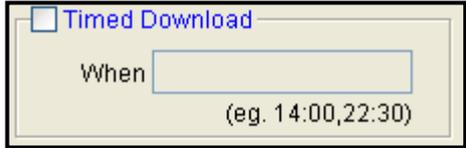
flexmls Login and Password: You must enter your login and password for accessing the flexmls system.



Timed Downloads

If you want flexmls PC to perform downloads at a specific time without your intervention, begin by checking the **Timed Download** box on the Connection Options screen.

In the **When** box, specify the times at which you would like your download(s) to occur each day. Note:



You must enter the times in a military format (24-hour clock). For example, if you want your download to occur at 2:30 a.m., enter 02:30 (including the leading zero for times before noon). If you want your download to occur at 3 p.m., then enter 15:00. In order to conserve computer resources, flexmls PC is designed to check for a scheduled download every 10 minutes; your timed download may occur anytime within 10 minutes of your specified time.

IMPORTANT: For the timed download function to work, your computer must be on, have access to a dedicated Internet connection or a live phone line connected to your modem, and flexmls PC must be open. Also, if using the flexmls PC login for multiple users, you must be logged on to flexmls PC as the “master” login, as that is the only login that can perform downloads.

Re-tries: By specifying a number of re-tries (0-9), flexmls PC will automatically continue trying to download or connect to flexmls in the event of a problem.



If you have set the “auto” or “timed” download options, flexmls PC will continue to attempt the download for the number of specified re-tries until the download is successful.

Searching

You may begin a new search from several areas of flexmls PC:

- Click an entry under the Search node on the tree-view menu.
- Click a link at the bottom of the Searches pane of the dashboard.
- Click the Search icon on the toolbar menu, then select a type of search.



FULL SEARCH

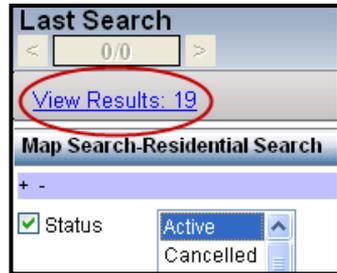
Choose the property types and statuses with which you wish to conduct a search. If you would like to search multiple property types or multiple statuses, hold down the control key on the keyboard while clicking on the items to be included. If you are searching multiple property types, you will only be able to search fields that are common to those property types. Click the **Next** button to continue.

A screenshot of the "Full Search" form. The form is titled "Full Search" and is divided into two columns. The left column is titled "Please choose one or more property types." and contains a dropdown menu with the following options: Residential, All Fields Test, Commercial, and Multifamily. The right column is titled "Please choose one or more statuses." and contains a dropdown menu with the following options: Active, Cancelled, Deleted, Expired, Pending, Sold, and Withdrawn. At the bottom of the form is a "Next" button.

Enter the search criteria into the available fields. The fields are presented in a tabbed interface. Each of the tabs has a set of fields contained in it that may be filled out. Click on a tab to see the fields of information.

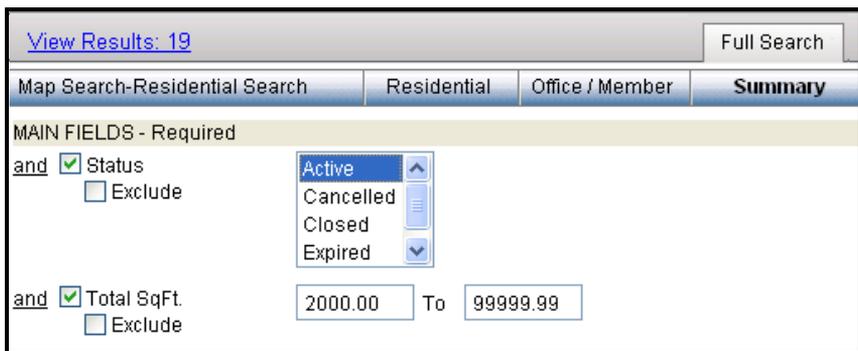
Headings in each tab that contain a Plus Sign (+) may be clicked on to expand additional information. Put a check mark in the fields to be included in the search. Fields with and/or/not options will allow you to specify how the fields will be searched with the rest of the information.

As you put in criteria for each chosen field, the search results are calculated and reported at the upper left corner of the screen.



SUMMARY TAB

Clicking on the Summary tab will provide a list of all currently selected criteria included in a search. You may quickly deselect criteria to vary your results, which are shown at the upper left corner of the screen. Click on any of the available tabs to add additional criteria. Once you are satisfied with your selections, you may choose to view your results by clicking **View Results** at the upper left corner of the screen. You may also save a search, begin a CMA, e-mail, print, or export results from this screen.

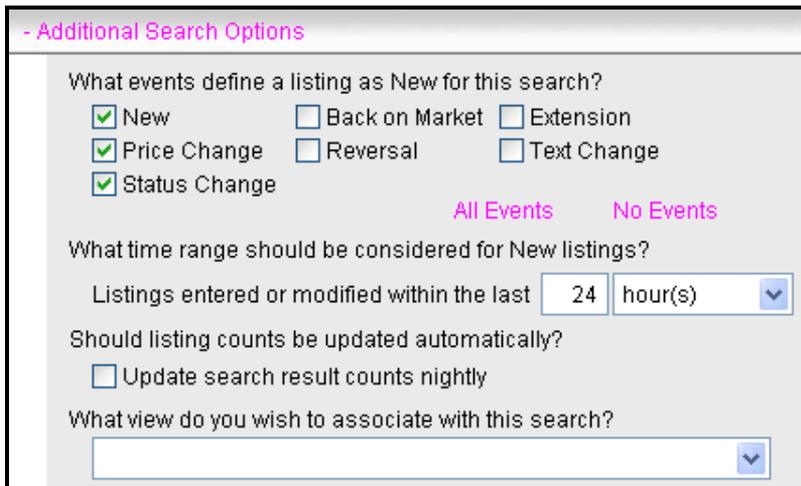


To save your search, click **Save**. A pop-up will appear with search options. From here, you may choose whether to replace an existing search or create a new saved search. To create a new search, click the radio button next to **New** and give the search a name. To replace an

existing saved search, click the radio button next to **Existing** and make any necessary changes.



Choose additional information related to the search by clicking on the Additional Search Options link to expand the menu. This menu determines how new listings will be tracked for this search and how the information will be viewed. Place a check mark next to the events that you would like the system to consider a new match for this search. To check all, click on the **All Events** link. To deselect all, click on the **No Events** link. All updates to saved searches will occur based on the criteria you select.



Next, choose a time frame to consider when tracking newly entered or modified listings. For example, if you

were accessing the program daily, 24 hours would be a good selection.

Check the box to have result counts updated automatically each time you perform a download. Then choose the view you would like to be associated with the search. The view determines the columns of information that will be seen on the Search Results screen for the saved search. Views are created and customized via the flexmls web-based system. (For more information on customizing views, see the *References* section of the flexmls manual.)

Click **Save** to see your search results, or **Cancel** to edit your search.

Saved Search Screen

Show My Saved Searches	
Saved Searches	Description
\$200-300K 3 bed	Search parameters
1111 Melissa	Property Type Residential; Status Active; List Price: Between 200000 and 300000; Total Bathrooms: Between 2 and 9999; Total Bedrooms: Between 3 and 99
2 beds, over 1 acre	
3BR 2BA Active	
500,000 plus	
Active Residential in City	
Alcorn2	Search description
Brandon	
CMA solds	
Colonial 3BR 2BA	
Residential Hot Sheet Search	
Rogers 5 Beds	
	Results
	View All 9

You may access your saved searches by clicking on **Saved Search** under Search on the tree-view menu. The Saved Search screen displays all currently saved searches. You may set up a new saved search and edit or remove existing searches from this screen.

Select a search and click **View All** under Results to view all matching listings.

Address Searching

To search for listings by address, click **Address** under the Search header of the tree-view menu.

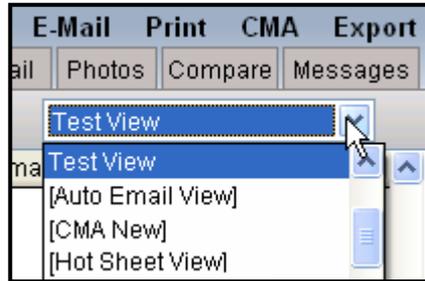
Quick Address Search					
Enter Search Information					
House #	Street Direction Pfx	Street Name	Street Addl Info	Street Suffix	Street Direction Sfx
From <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
To <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
County <input type="text"/>	City <input type="text"/>	State <input type="text"/>	Zip <input type="text"/>		
Status	Status Change Date				
<ul style="list-style-type: none">ActiveCancelledClosedDeletedExpiredPendingWithdrawn	From <input type="text"/>				
	To <input type="text"/>				
<input type="button" value="Next"/>					

Next, fill in all available address information. The program automatically searches with “begins with” logic for the street name field. For example, if you are not sure of the address for a listing but you know that its street name begins with “North”, type “North” in the street name field. Your matches will include everything that begins with the word North (e.g. Northwood, Northstar, etc.). Remember; less entered information yields more results.

Choose which statuses you wish to include in your address search. You may enter a status change date range to search within. No specific fields are required for entry. Click **Next** to perform your search. You will proceed to the Search Results screen.

Views

The columns of information that you see on the Search Results Page are also customizable. The drop-down menu at the top of the search results screen contains the different sets of columns or Views that can be used to look at the listings. Choosing a different View will change the columns of information that you are seeing for that set of listings. These Views are customizable and are drawn from your user Preferences in flexmls Web. Views can be set up and edited in the online portion of flexmls. Once changes are made, the next time a download for flexmls PC occurs, those views will be brought down into the program from flexmls Web.



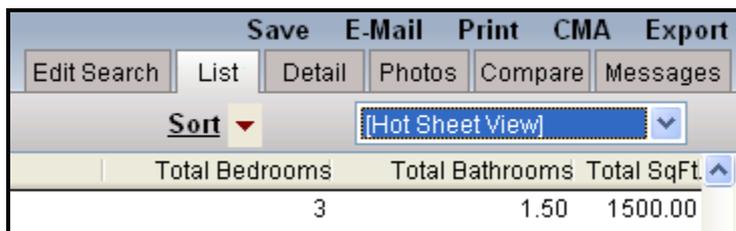
Select Listings

Select listings on the Search Results page by placing a check in the check box next to the listing. Click on the Selected tab to look at just those listings you've selected with a check mark. Review those listings on a map, or compare the listings using the other tabs of the Search Results page.



Search Results

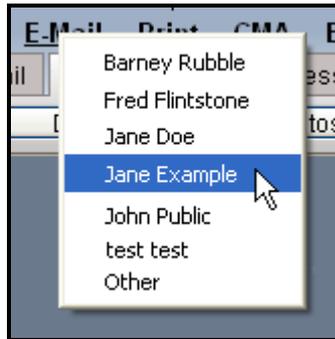
Search results display using a tabbed interface to display different information, similar to the search results page on flexmls Web.



- **Edit Search:** View and change your search criteria from here. Once changes have been made, click **View Results** to view your matching listings.
- **List:** The List tab presents your search in a list, with columns of information that are taken from the Views in the user's Preferences in flexmls Web. A small photo and summary of details is displayed in a panel at the left edge of the search results screen.
- **Detail:** On the Detail tab, review the Listing Report, History, Documents, and more.
- **Photos:** Using the Photos tab, review listing photos individually using the arrow buttons to navigate, or click on the Slide Show option to view all of the photos for one listing, or all listings, in slide show format.
- **Compare:** Review brief statistics comparing the current listing to the others in the search results set, or use the Three-Up Details option to compare summary information for three listings at a time.
- **Messages:** On the Messages tab, read and review any messages regarding the current selected listing.

E-Mailing Listing Links

Choose the listing or listings that you would like to send, then click **E-Mail**. Select a contact from the list, and your desktop-based e-mail client (a program like Outlook or Thunderbird) will open. Using your e-mail program, customize the message that you would like to include with the link to view the selected listings.



Printing/E-Mailing Listing Reports

To print listings or e-mail listing reports, click **Print** on the Search Results page. You can choose to print or e-mail the current listing, those listings you've selected with a check mark, or you can print or e-mail your full set of results. Next, select what listing information you'd like to print or e-mail.

- **Version:** Choose whether you would like to print the Public or Private version of the information.
- **List:** Choose if you would like to print a list of the listing information – choose from your available views, and place a check in the box marked **One Line** if you would like to exclude listing photos.

- **Short Listing With/Without Photos:** This is the short form of information containing just a few selected fields. The fields that are available here are customized in the Preferences section of flexmls PC, under Short Display on the menu.
- **Detail:** View and print the full listing report.
- **Photos:** Select whether you would like to include all photos, or just the primary photo for each listing.

Next, select a destination for your printer-friendly reports. Click **E-Mail** to send a PDF attachment of your selected listing information using your local e-mail client (Outlook, Thunderbird, etc.).

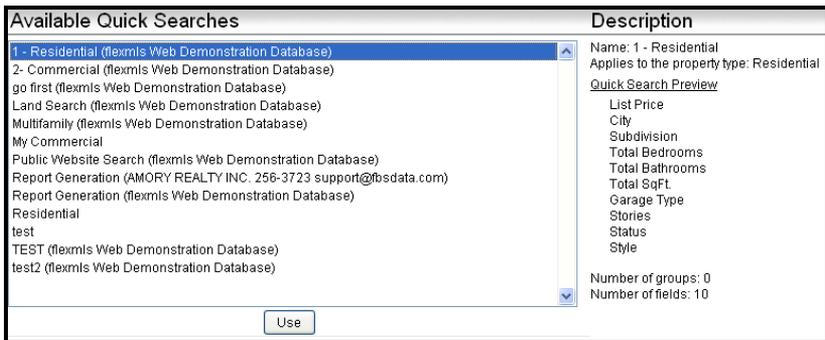
Click **Preview** to preview your listing information in the right-side panel of flexmls PC.

Click **Print** to send the listing information to your default printer, or click **Export** after using the drop-down list below to select a file type to save the information as a .pdf, .doc, or other file types.



Quick Searches

Click on the Quick Search node under Search in the tree-view menu, or click on **Quick Search** from the Searches Panel to view your available quick searches. These searches must be created online in flexmls Web under Preferences, My Quick Searches. Quick searches allow you to use only the criteria you deem important to narrow down your results.



Double-click on the name of the Quick Search you would like to use, or select the search and click **Use** at the bottom of the window.

Click on the field you wish to input information for and use the tab key to move forward, or simply click on the next field of entry. As you add or change criteria the search results will be counted and reported in the right panel of flexmls PC.

21

listings matched your search

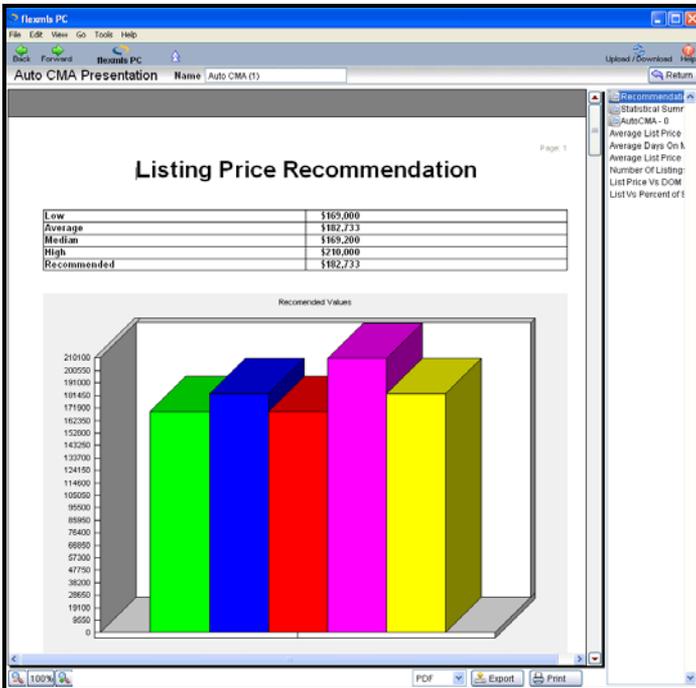
- [View results in a list](#)
- [Show listing details](#)
- [See photos](#)
- [Compare listings](#)
- [See Messages about listings](#)
- [Save, E-mail or Print](#) your listings
- [Create CMA](#) or [Export](#)

After you have added all of your criteria you view your matching listings by clicking on the **View Results** link, or by clicking on any of the tabs of information shown at the upper right.

[View Results: 75](#)

Creating and Editing CMAs

flexmls PC allows you to create Comparable Market Analyses using the CMA function. Click on the **CMA** in menu or from the Search Results page to begin. From the Create CMA screen, select an existing CMA and click **Edit**, or click **New** to create a new CMA.



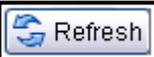
The CMA Presentation screen allows you to enter information about the subject property in the right pane. From this pane, you may also search for comparables using your criteria, or search by Listing number or Listing Cart.

Enter the information about your subject property, and add a photo of the subject property using the button shown below:

Picture  Click to add image of Property

Enter your search criteria and click **Search** to find listings. Select a listing and click **Remove** to remove it from the comparables used in the CMA.

After changing any search criteria, click **Refresh** to update the CMA.



To customize the pages of your CMA, click the **Options** button.



Auto CMA Options

Cover Page Show Cover Page
 Use Cover Page Document


Auto Generate Cover Page
Top Image 
 Agent Info
 Prospect Info
Bottom Image 

Charts
 Average List Price
 Average DOM
 Average List / Sq Ft
 Total Listings
 List Price -Vs- DOM
 List Vs Percent of Sale / List

Adjustments
 Perform Automatic Adjustments

Comparables
Include: Recommendation
 Statistics
 Listing Details Private

- Subject Property test

Address Search
City / State Zip

	Subject	Search	Use
Total Bedrooms	3	3	<input checked="" type="checkbox"/>
Total Bathrooms	2	2	<input checked="" type="checkbox"/>
Total SqFt.			<input checked="" type="checkbox"/>
Lot Size			<input checked="" type="checkbox"/>
Lot Acres			<input checked="" type="checkbox"/>
Style	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Garage Type	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Fireplaces			<input checked="" type="checkbox"/>

Picture 

- Comparables 50 Listings

<input type="checkbox"/>	04-9	Active	151 WOODSM	
<input type="checkbox"/>	04-10	Active	1918 Anywher	
<input type="checkbox"/>	01-21	Closed	2628 WHEATL	
<input type="checkbox"/>	03-39	Closed	4725 8 S Av, F	
<input type="checkbox"/>	03-95	Active	113 CAROLA	
<input type="checkbox"/>	04-11	Closed	1918 Anywher	
<input type="checkbox"/>	04-107	Active	76 circle way,	
<input type="checkbox"/>	04-127	Active	76 Circle Way,	
<input type="checkbox"/>	04-135	Pending	4724 8 S AVE	

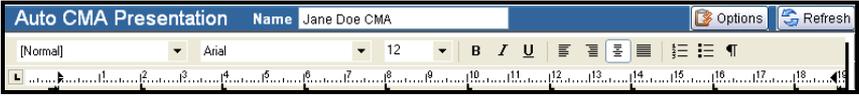
MLS # Add Remove

On the CMA Options screen, select whether you would like to include a Cover Page, and how you would like to generate the Cover Page. You may add images to your Cover Page using the **Click to add image** buttons.

You may also select which Statistical Charts you would like to use in your CMA, and whether you would like Adjustments to be automatically performed.

Choose how you would like the comparables displayed (whether to include Listing Details, for example, or a summary only).

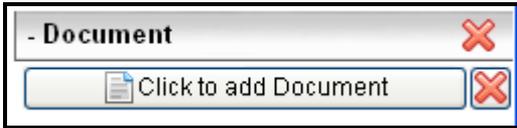
Working with your CMA Document



The CMA screen allows you to make formatting changes to the text of your CMA using word processing tools at the top of the CMA screen. Select your font, size, alignment and create numbered or bulleted lists using the buttons in the word processing toolbar.

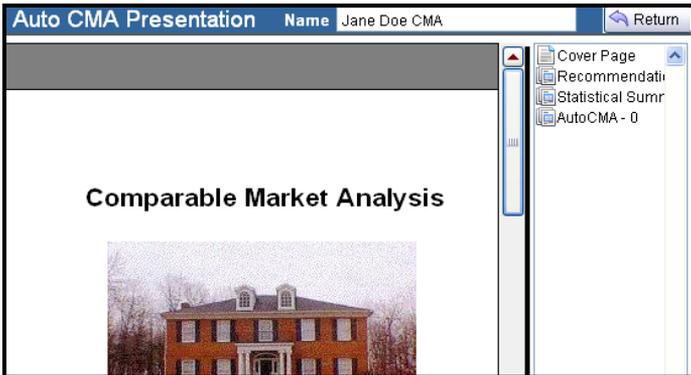
Adding Documents

To add existing documents to your CMA, simply click the **Click to Add Document** button.



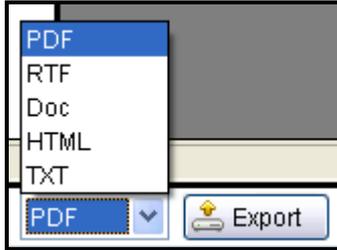
Previewing your CMA

To preview your CMA in its current state, click the **Preview** button. Click **Return** to resume editing your CMA.



Exporting and Printing your CMA

You may export or print your CMA directly from the CMA creation page. To export, click the drop-down list next to **Export** to select the export type from the list of options.



You may choose from several document formats. If you intend to e-mail the CMA, a PDF or HTML document will work well, as recipients will likely have the necessary tools to open the attachment.

If you would like to edit the CMA using a word-processing program you have on your computer, an RTF or DOC file will give you that ability.

Select TXT if you would like to export the CMA as a plain text file.

To print your CMA, click **Print**. The CMA will automatically be sent to your default printer for immediate printing.



Contacts

Creating, Viewing and Editing Contacts

You may access Contact Management by clicking on the Contacts header on the dashboard screen, or by clicking the **Contacts** node of the tree-view menu.

The screenshot displays the 'Contact Management' interface. At the top, there is a search bar and a 'Group' dropdown menu. Below this is a table listing contacts:

Id	Name	Phone	Email
Daren Daren	Daren, Daren		Daren@daren.com
Ellen	Ellen, Example		ellen@example.com
Greg Kilwein	Kilwein, Greg		greg@fbsdata.com
Jane Doe	Doe, Jane	(555) 555-5510	Jane@janedoe.com

Below the table are buttons for '+ New Contact' and 'X Remove Contact'. The main area shows the details for 'Daren Daren', with tabs for 'Searches', 'Notes', 'Action Plans', and 'Carts'. A 'Save' button is in the top right. The contact details include:

- Contact ID: Daren Daren
- Email: Daren@daren.com
- Enable Reverse Prospecting:
- Last: Daren, First: Daren, Middle: [empty]
- Spouse: [empty], First: [empty], Middle: [empty]
- Street 1: [empty], Street 2: [empty]
- City: [empty], State: [empty], Zip: [empty]
- Primary: [empty], Mobile: [empty]
- Home: [empty], Other: [empty]
- Office: [empty], Pager: [empty]
- Fax: [empty]

On the right side, there are buttons for 'Add Group' and 'Del Group'. At the bottom, there is a large text area for notes, with 'Edit' and 'Del' buttons. At the very bottom, there is an 'Info Type' dropdown set to 'Salutation' and an 'Add' button.

From Contact Management, you can:

- View and scroll through all of your Contacts. As you scroll through your contacts, notice that the bottom pane of the screen changes to show you the available information stored for each entry. You may make changes to contact information, enter additional information by selecting from the Info Type drop-down, or add notes by clicking on the **Notes** tab. Any entries

you make will automatically be saved. You may also access Action Plans, add Contacts to Groups, sort by Groups, or search Contacts by entering specific information. (flexmls PC synchronizes contacts with flexmls Web. You may select whether flexmls PC has priority for changes under Tools, Options, Upload/Download.)

- To remove a contact, first click on the contact you wish to remove, then click **Remove Contact** at the bottom of the Contact Management list. Add a new contact by clicking on the **New Contact** link at the bottom of the Contact Management list.



- Filter your contacts to see only a selected portion by clicking on the **Group** drop-down list to specify the group you want to see.



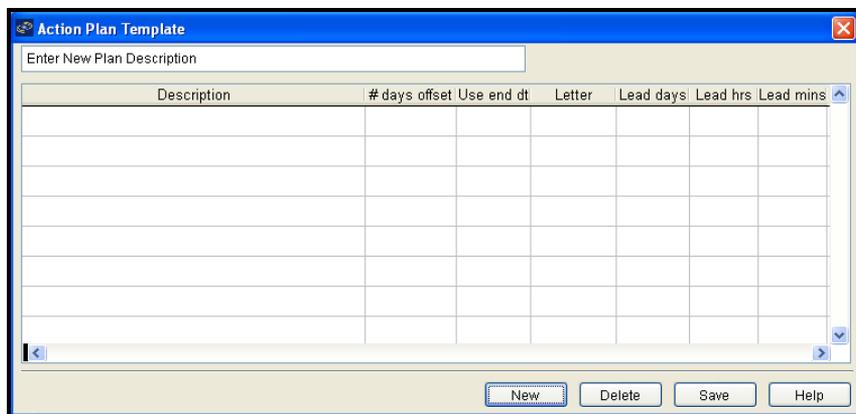
- Quickly e-mail your contacts by selecting the contact you want to e-mail and clicking on their e-mail address in the top pane.

Action Plan

Creating New Action Plan Templates

Action Plan Templates allow you to define specific steps you want to take with respect to particular types of contacts. For example, you may want to create specific follow-up routines to apply to new sellers. On Day 1, you may want to send the listing contract, and on Day 2, you may want to send a marketing plan.

To create a new Template, click on **Preferences** in the tree-view menu, and then select **Action Plans**. Click **New** to create a new Action Plan Template.



Click your mouse in the field **Enter New Plan Description**, delete the text and type the description for your plan.

Click **New** to add your first action item.



Enter the description for the first event. For example, if you are building an action plan for marketing, you could enter "Send Introductory Letter."

Enter the # of days offset. This is the order in which you want things to happen. For example, if you want the introductory letter to be sent one day after you apply the

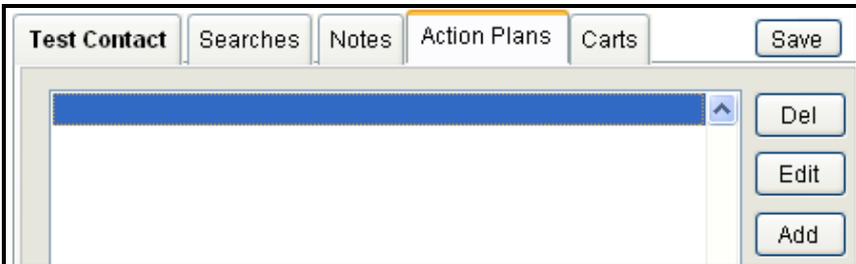
plan to a contact, enter a “1” in this field. If you want it to go out the same day, enter a “0.” Similarly, as you add other events, you can order the time in which they occur by setting the **# days offset**. Just remember that the days are cumulative. For example, if you want the second event to occur three days after the first, and the first occurred two days after you applied the plan, then you should enter a “5” for the second entry -- it will then occur three days after the first event, which is five days after the plan was applied.

Description	# days offset	Use end dt	Letter	Lead days	Lead hrs	Lead mins
New Event	0	<input type="checkbox"/>		0	0	0

If you check the **Use end dt** field, then the “days offset” will run from the end date of your plan as opposed to the beginning date of your plan. This is convenient if you have some events that are tied to the beginning of the plan and some that must occur a specific time before the plan ends.

Select a letter for the event, if applicable. If you would like to be reminded of an event before it comes due, specify the number of lead days for the event. Repeat this process for all events you want to enter for this plan. Click the **Close** button to save your new Template.

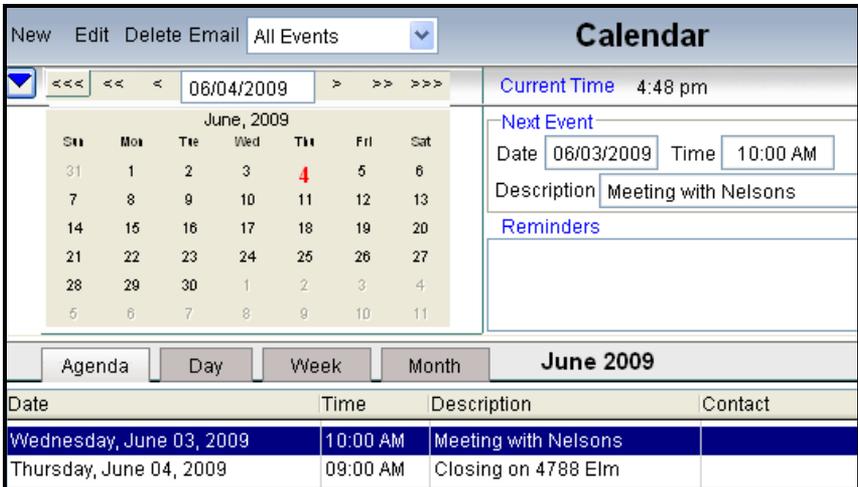
Applying an Action Plan Template: To apply an Action Plan Template to a contact, click on **Contact Management** and highlight the contact for which you wish to apply the plan. Next, click the **Action Plans** tab above the Contact ID. Click the **Add** button to apply a new Action Plan for this contact.



Select the Action Plan template you want to apply and specify the start date for the Plan. Click **Add** if you want to add the plan, otherwise click **Cancel**.

If you click **Add**, you will be given the opportunity to modify the template plan for any special circumstances you may have for this particular contact. When you are done making changes, click **Save** and the plan will be applied and your calendar updated.

Calendar: The calendar in flexmls PC allows you to create both time specific entries and tasks (no time specified) to be performed by a specific date. You can also create appointments and events for specific contacts in your contact management module.



Date	Time	Description	Contact
Wednesday, June 03, 2009	10:00 AM	Meeting with Nelsons	
Thursday, June 04, 2009	09:00 AM	Closing on 4788 Elm	

Navigating the Calendar: There are four views of the calendar data – the Day, Week, and Month views list events for the specified time periods, and the Agenda lists all of your calendar entries. You can change the active date by clicking on the date you want in the calendar at the top, entering a date in the text box above the calendar, or clicking on back and next arrows next to the text box above the calendar.

Creating a New Event: To create a new calendar event, either click on the **New** button on the Calendar toolbar or double-click on the time for which you want to create the event. A pop-up window will allow you to enter a description, time, and contact information for that calendar event. 

Editing/Deleting an Event: To edit or delete an event, select the event you want and click on the **Edit** or **Delete** button on the toolbar. 

E-mailing an Event: If you have specified a contact with an e-mail address for an event, select that event and click on the e-mail button on the toolbar to open your e-mail client with the e-mail address and event description pre-populated in the e-mail message.

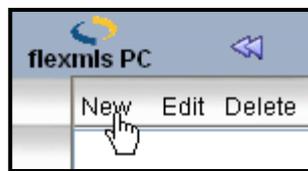
flexmls PC Preferences

You may access Preferences from the tree-view menu or from the toolbar menu. Under Preferences, you can:

- Create Custom Reports for printing.
- Create different Short Displays for printing multiple listing reports and for viewing data from search results.
- Create Custom Sorts for displaying your information.
- Setup custom fields to be exported to Pocket Real Estate.
- Create Action Plan Templates for pre-scheduling activities for contacts.
- Edit Template Letters.

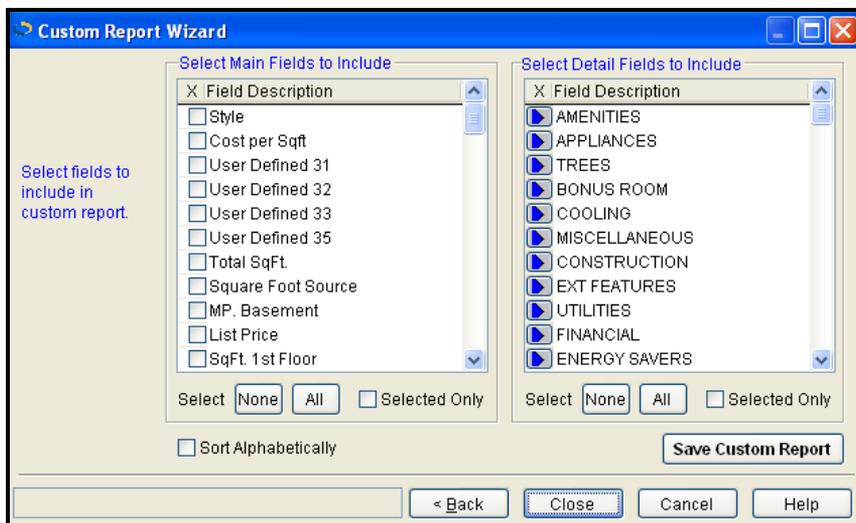
Creating Custom Reports

The Custom Reports option is found under the Preferences section of the tree-view menu or the **Preferences** button on the toolbar. To create a Custom Report, click on the **New** button on the Custom Reports toolbar. The Custom Report Wizard will open.



Type in a name for your Custom Report in text box at the top of the Custom Report Wizard. Select the Property Types and Statuses for which you would like this report to apply. To include a picture with each listing, check the **Include Picture** box and specify the position for the picture. Click on the appropriate radio button for landscape or portrait orientation for your report, and then click the **Next** button to go to next screen of the Wizard.

On the second screen of the Wizard, you will be able to choose which fields you would like to appear on the report. Keep in mind that the Custom Reports are really designed for printing multiple listings, so they present themselves best if you limit the number of fields you choose.



To select a Main List field, click in the check box next to the field name. To select a Listing Detail, click on the arrow next to the detail group name and the available details under that group will appear. Next, check the box next to the field you want to show on the report.

To see what fields you have selected, check the **Selected Only** box. When you are finished, click the **Save Custom Report** button on the bottom right of the Wizard.

Short Displays

For each property type and status you can select what data fields you would like to see when viewing search results, when you send an e-mail of a listing and in the default Short Display multiple listing report printout. To create a new Short Display, click on the Preferences option in the tree-view or from the toolbar, then click on **Short Display** under Preferences.

Pick the Property Type and Status for which you would like to adjust the short display information. The available fields for adding to the short display are shown in the left list box and the fields that have already been chosen are shown in the right list box.

To add a new field to the short display, select a field and double-click on it. It will be added to the right list box. To remove a field, double-click on it and it will be removed.

To change the display order of the applied fields, click once and hold on the gray box next to the field name and then drag the mouse pointer to the position where you want the field to appear. To restore the short display to the defaults for the property type and status you have chosen, click on the **Set to Default** button.

To speed the process of setting up short displays, utilize the copy and paste function. Select the property type and status for the short display you want to copy and click the **Copy** button. Then select the property type and status to which you want to copy the short display and click **Paste**.

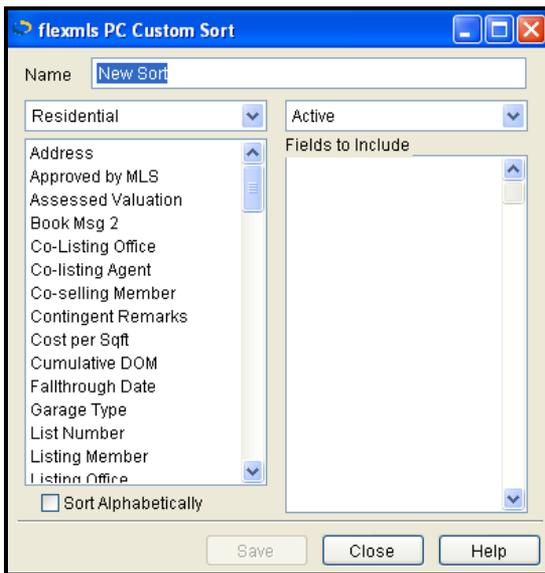
The screenshot shows a window titled "Short Display" with the following components:

- Property Type:** A dropdown menu with "Residential" selected.
- Status:** A dropdown menu with "Active" selected.
- Fields to Include:** A list of fields with checkboxes and a vertical scrollbar. The fields are: Total SqFt., List Price, Status, Total Bedrooms, Total Bathrooms, Area, Public Remarks, and Private Remarks. The "Status" field is currently checked.
- Buttons:** "Set To Default", "Copy", and "Paste".
- Left List Box:** A list of fields that have already been added to the short display: Approved by MLS, Book Msg 2, Co-listing Agent, Co-selling Member, Contingent Remarks, Fallthrough Date, Garage Type, List Number, and Listing Member.

Custom Sort

For each property type and status you can select what data fields you would like to sort by when viewing search results.

To create a new Custom Sort, click on the Preferences option in the tree-view menu or from the toolbar, and then click on **Custom Sort** under Preferences. Click **New** and pick the Property Type and Status for which you would like to adjust the sorting of display information.



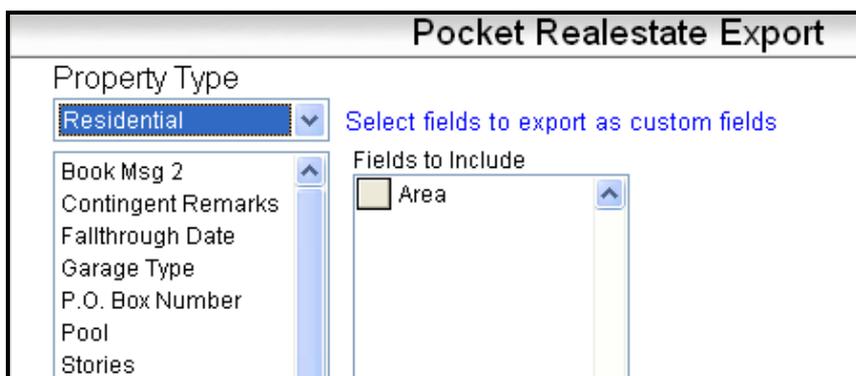
The available fields for adding to the custom sort are in the left list box and the fields that have already been chosen are in the right list box. To add a new field to the custom sort, find the field you want to add in the left list box and double-click on it. It will be added to the right list box.

To remove a field from the custom sort, double-click on it and it will be removed. To change the display order of the applied fields, click once and hold on the gray box next to the field name and then drag the mouse pointer to the position where you want the field to appear.

Pocket Real Estate

For each property type and status you can select what data fields you would like to see when exporting your data to Pocket Real Estate (if applicable). To select the fields to export:

Click on the **Preferences** option in the tree-view menu or from the toolbar, and then click on **Pocket Real Estate** under Preferences.



Select the Property Type for which you would like to adjust the Custom Export information.

Available fields for the custom export are displayed in the left list box, and the fields that have already been chosen are in the right list box.

To add a new field to the export, locate the field you want from the left list box and double-click on it. It will be added to the right list box. To remove a field from the export, double-click on it in the right list box and it will be removed.

To change the order of the applied fields, click once and hold on the gray box next to the field name and then drag the mouse pointer to the position where you want the field to appear.

Add Listings for Uploading

To enter listings for upload to the live system (where applicable) you may click on **Go** in the menu bar and choose **Add Listings**, click **Add Listings** on the tree-view menu, or click on **Add** from the toolbar.

Click on **New** to enter a listing. Highlight any saved listing and click on **Edit** to make changes to that listing prior to uploading. Highlight any saved listing and click **Remove** to remove that listing.

A screenshot of the 'flexmls PC' software window. The window has a blue title bar and a menu bar with 'Type', 'Address', 'Main', 'Details', and 'Rooms'. The main area is titled 'General Listing Information' and contains several fields: 'Property Type' with a dropdown menu showing 'Residential', 'Listing Prefix' with a dropdown menu showing '09:2009 Listings', 'Listing Agent' with a list box showing 'User, Demo of AL PLEASANTS APPR-IN', and 'Co-Listing Agent' with a dropdown menu showing '~None~'. Below these fields is a 'Next' button. At the bottom of the window is a toolbar with buttons for 'Save and Copy', 'Save for Later', 'Save', 'Close', and 'Help'.

You may only make changes to listings that have yet to be uploaded to the database. Any subsequent changes must be made via the online system (flexmls Web). Once a listing has been uploaded, it will not be available to edit from within flexmls PC.

Type

Click on the drop-down arrows to select property type, listing prefix, listing member and co-listing member if applicable. Click **Next** to begin entering listing information.

Address Information

Enter all available address information using the text and drop-down fields. Click **Next** to continue.

Main Listing Data

Enter information in the fields provided. Use the tab key to move to the next field (shift key + tab key to move backward), or simply click on the field of choice. Click on the drop-down arrows to select input from pre-defined lists. A red highlighted field is a required field for entry. You must enter information in the red highlighted fields. When finished entering data, click **Next** at the bottom of the screen.

General Property Description	
Style	<input type="text"/>
Total SqFt.	<input type="text"/>
Total Bedrooms	<input type="text"/>
Total Full Baths	<input type="text"/>
TEST FIELD	<input type="text"/>
Square Foot Source	<input type="text"/>
Total Bathrooms	<input type="text"/>
Total Half Baths	<input type="text"/>

Details

Click the boxes for the items that apply in each section. Click in the open fields to type in specific text or numeric data. Click on the drop-down arrows to select input from pre-defined lists. Use the tab key to move to the next field (shift key + tab key to move backward), or click on the appropriate field to enter information. You must enter information in the red highlighted fields, as those fields are required. Click **Next** to continue.

Rooms

You may list the various rooms, their location, and any remarks you wish about the rooms included in the property (where applicable). Click the drop-down arrow to select a room type. Use the tab key to move to the next field, or click on the field to enter the room level. Click **Next** to continue.

Room Name	Room No. of Level	Rooms	Length	Width	Area	Room Remarks
<input type="text"/>	<input type="text"/>	<input type="text"/>				
				<input type="button" value="Next"/>		

Change Menu

From the Change Menu screen, you may click on any of the links to make changes or review your entry. Click on the item you wish to edit and you will advance to that screen. Click on the camera icon to enter the Photo Maintenance screen. From the Photo Maintenance screen you may add or remove photos and enter captions.

Text Changes

To make a text change, click on **Main Listing**, **Details**, **Rooms**, or **Supplement** to make changes to the corresponding information.

You may only make changes to listings that have yet to be uploaded to the database. Any subsequent changes must be made via the online system (flexmls Web). Once a listing has been uploaded it will not be available to edit from within flexmls PC.

You may view or print listings in report format before they are uploaded by selecting them from the list and clicking on **Print** at the bottom of the list.

Photos

The first step when adding a photo to a listing is to click the **Photos** link on the Change menu. Click the **Add Photo** button (this is not necessary if you are adding a photo for the first time). The first photo you add will be designated as the Primary photo. Click **Browse** to select the photo you wish to load. This will open a window where you can locate the photo on your computer. Double-click on the file and you will see the file name appear on the first line of the Add Photo screen. You must enter a description for the photo. You also have the option of adding a caption to appear below the photo. Click **Save** and the photo will appear in the window.



You may make changes by clicking **Edit/Replace**. To remove a photo, select it from the list and click **Remove**. You may order the photos by clicking on the arrows to the left of the description and dragging up or down. Click **Done** when you are finished and you will return to the Change Menu screen.



Supplement

The Supplement is a field that may contain up to 10,000 characters of text to be entered as additional listing information. Information entered in the Supplement may be viewed online and will also be added to the MLS publication (where applicable, MLS preferences and rules apply).

Enter supplemental listing text here
(10,000 characters max)

Done

Saving Listings for Upload

If you are satisfied with your entry and wish to submit the listing when you perform your next upload/download, click **Save** and your listing will be considered ready for uploading to the database (there will be a check mark next to the listing on the Add Listing screen).

X	Listing
<input checked="" type="checkbox"/>	1234 Demonstration Ave, Fargo, ND 55555

Saving Listings for Later

If you are not finished entering information, or need to hold the listing for any reason, click **Save for Later** and the listing will be held until you mark it as ready for uploading.

Save for Later

Further Questions?

Toll-free Technical Support

support@flexmls.com

888-525-4747

Monday-Friday 8:00am-9:00pm Central Time